



## COURT ACCESS TO INFORMATION ON LICENSED PROFESSIONAL FIDUCIARIES



Dear Court Representative:

To access the following information on Licensed Professional Fiduciaries please visit the Bureau's website at [www.fiduciary.ca.gov](http://www.fiduciary.ca.gov):

- Licensee name and license number
- License issuance and expiration date
- Court removals and bankruptcy information
- Client assets and license discipline

Client assets will be available once reported to the Bureau on the annual reports as required by law (The law provides that a licensee file an Initial Annual Statement with the Bureau within 60 days of licensure and then an Annual Statement at least 60 days prior to license renewal each year). Any disciplinary action against a licensee by the Bureau will also be posted on the website upon occurrence.

In addition, the Bureau is prepared to provide courts will **confidential information** on licensees as required by law once the information is reported to the Bureau:

- Current conservatees or wards and the trusts or estates currently administered by licensee
- Business and residential addresses and telephone numbers of licensee
- Client names, and case numbers if applicable, for all conservatorships, guardianships, and trusts or estate administration cases on closed cases for licensee

**To request confidential information on licensees, you must first obtain a private official account from the Bureau for security purposes. The private account is for your use only and is not to be shared. To request an account:**

1. Complete the **COURT AUTHORIZATION REQUEST FORM** in its entirety. Provide official contact information only. ***No personal or private contact information will be accepted.***
2. Send a letter on official court or authorized agency stationery requesting an account.
3. Mail the completed form and letter to the Bureau:

Professional Fiduciaries Bureau  
Post Office Box 989007  
West Sacramento, CA 95798-9007

Beginning Fall 2008, you will be able to access reports directly online through a secure electronic account with the Bureau. When the system is ready, any court representative with an open account will receive an email communication from the Bureau providing instructions on how to logon and use the secure online account.

I look forward to working with you on consumer protection.

Sincerely  
Mellonie Yang, Chief  
Professional Fiduciaries Bureau  
(916) 574-7340